Learn to use the Lead Management Tool
How to use the Lead Management Tool

• **Overview** (pages 2-3)

• **Getting Set-up** (pages 5-8)
  – Your PartnerDirect Admin creates Lead Users or Lead Super users

• **How to view your partner uploaded leads in the tool** (pages 9-13)

• **How to accept new Leads from Dell** (pages 14-17)

• **Increase your ROI results by matching Leads to Deals** (pages 18-22)

• **Review** (pages 23-25)
What is the Lead Management Tool?

- **One stop shop** that provides a single point of access for all of your Dell lead information through the Partner Direct Portal

- **Closed loop system** – giving you visibility on campaigns, leads, pipeline and revenue

- Gives you the capability to easily manage leads that you generate from your co-branded campaigns or from leads that you may receive from Dell

- **Add individual leads** to the system or use the mass upload template after a Dell joint or co-funded marketing activity or event

- **Link to Deal Registration Submission** - Leads can be converted to deal registrations at the click of a button in the Lead Management Tool
How does the Lead Management tool benefit you?

Saves time, effort and money

- Partners can manage all Dell leads in one place
- Assign leads to partner sales reps at the click of a button
- Submit deal registrations for approval using the leads – automatically tracking pipeline

Provides tracking and analysis

- Partners through their Dell Marketing contact can review ROI and campaign successes for future growth and additional demand generation support

Makes Collaboration easier

- Partners have full visibility of leads and status via PartnerDirect
- Dell Channel team has full visibility of leads and status via SFDC
Getting Set up in Lead Management Tool

Adding users to Lead Management Tool

There are two ways to add users:

- The Certified PRD team can add users (certifiedpartner_r@dell.com)
- Your partner company admin for the PartnerDirect portal can add users
How PartnerDirect Admins can add users

- Go to Support, then Partner Support
- Go to Dell Account Settings
- On Account Settings page find “Manage your account users”
- Select either
  - “Add New Account Contact”
  - “Edit existing user profile settings”
    - Scroll to bottom of next page to find existing users
How PartnerDirect Admins can add users

At a minimum, check off the following:

• **Allow Deal Registration**
• **Allow Lead Management**  
  – (not visible until Deal Registration is clicked)
• **SAVE**
• Other items can be enabled as well but at least check the 2 above

Also available:

• **Enable Lead Super User?** – allows visibility into all leads at the Partner Account, regardless of owner
• **Enable notifications** – allow users to be notified when new leads are available (recommended)
How PartnerDirect Admins can add users

• **Lead Users** versus **Lead Super Users**
  – **Lead Users** can view and manage only those leads assigned in their name
  – **Lead Super Users** can view and manage all leads assigned to anyone at the partner company

• Each Partner company determines how the Lead Management Tool should be used internally
  – If you want leads to be worked by specific users, assign to **Lead Users**
  – If you want leads to be worked as a group, assign to any **Lead Super User**
View your leads

Partner-uploaded leads arrive in ACCEPTED status
Lead Management Tool – Partner uploaded leads

The Partner Lead Owner will receive an email from Dell - notifying that leads are ready in the PartnerDirect portal.

Dear lyn toomey,

Leads that your partner company has uploaded are now ready to be viewed and worked.

To view your leads please login to PartnerDirect home page (http://www.dell.com/us/partner).

From there click the “View My Leads” button.

When Partners upload their own leads into the tool, the leads arrive already in Accepted status.

Use this email as a reminder to retrieve your leads directly from the PartnerDirect portal (shown next)
Lead Management Tool – View your leads

To view your leads go to PartnerDirect, login, then navigate to the lead

› Login first.
› Go to Tools & Resources
› Select Marketing Tools
› At bottom of page select Lead Management and Learn more

› Next page, select “View My Leads” button

› Select the view you want. Common selections are “All My Leads” or “View All Leads” or “Leads Pending Acceptance”
Lead Management Tool – View your leads

**TIP #1:** Always click the **GO** button, if there is one, to enable the view
- No visible **GO** button means view is updated

**TIP #2:** Be aware of what “**View**” you are in
Lead Management Tool – View your leads

Different Views show you different information

- **All Accepted Leads**: Use this view when you want to use your own event leads to view & qualify the lead, or register a deal. Partner-led event leads arrive automatically in Accepted status.

- **All Leads Pending Acceptance**: Use this view to see leads sent to you by Dell-led events. These “new” leads must be acknowledged by clicking the “Accept” button to assure Dell that you’ve seen the lead and are working it.

- **All My Leads**: use this view to see leads that are assigned specifically to you

- **View All Leads**: use this view to see all leads regardless of who the owner is. This view is most useful to Lead Super Users.
Lead Status - Assigned

How to accept “new” leads from Dell EMC
Lead Management Tool – Assigned leads

On occasion you may receive a lead from a Dell-led campaign (not a campaign where you gathered the leads and uploaded them)

These leads are known as Assigned leads and will not arrive in Accepted status, they’ll arrive in NEW status

These leads must be Accepted (see next)

You will receive a notification email to let you know the lead is awaiting your Acceptance

---

Dear Lyn Toomey,

Leads have been assigned to you, please click the Accept button to acknowledge within 48 hours.

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th>Campaign Owner</th>
<th>Number of Leads</th>
<th>Partner User</th>
<th>Partner Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dell-led Channel Campaign for Partners</td>
<td>Lyn Toomey</td>
<td>1</td>
<td>lyn toomey</td>
<td>IEST – Channel STG Accoun1USA1x</td>
</tr>
</tbody>
</table>

To Accept your leads, login to PartnerDirect and navigate to the Lead Management web page. Look for your new leads in the view “All Leads Pending Acceptance”.

---
Lead Management Tool – Assigned leads

Find the “new” leads

- Assigned leads arrive as New in Partner Lead Status column
- Assigned leads can be Accepted or Rejected
Lead Management Tool – Accept your leads

1. Accept from the ‘View All Leads’ view, find the **New** status, check, Accept.

2. Or Accept from inside the lead. Open the lead by clicking on the lead **Name** in above view. Once open, click Accept button.
ROI - link Leads and Deals
Lead Management Tool – Match leads and deals

Partners can show ROI several different ways:
- Send in your initial Lead ROI form with Deal ID #’s
- Update your Lead ROI form at a later date with Deal ID #’s (with PMM)

- In the Lead Management Tool use your Lead to submit a Deal Registration
- In the Deal Registration Tool use your Opportunity to match back to a lead (see Channel Lead section in your deal reg)
Lead Management Tool – Match leads and deals

You can use the Lead ROI form to match your leads to deals.

- When uploading your lead list into the Rebate and MDF Tool indicate any early Deal ID #’s on the form. Dell EMC will match up your lead, campaign and deal for you!

- Send later updates to the Lead ROI form to your PMM and Dell EMC will again also match up your lead, campaign and deal for you.
Lead Management Tool – Match leads and deals

In the Lead Management Tool you can use your leads to register your Deals.

Inside the lead, make the “New Deal Reg” button visible, then submit a new deal registration:

- **Click the Update Record button:**

  - Change “Contacted Customer” to “Yes”
  - Change “Sales Qualified?” to “Qualified”

- **SAVE**

Now the “New Deal Reg” button is ready for use

- **Click “New Deal Reg” button to submit for Deal Registration.**
- Complete the Deal Registration process as usual

Using the lead buttons embeds campaign tracking in the background, increasing your ROI reporting
Lead Management Tool – Match Deals and Leads

In the Deal Registration tool use your DEAL to match it back to your LEAD and show ROI.

Inside your Deal find the section called ‘Channel Lead Information’.

There are two ways to match. First click EDIT button at top:

› In the **Channel Lead** field, search for the name of the lead, select and SAVE. Once done, the Campaign name will also auto-populate in ‘Primary Campaign Source’ to the right

› OR - In the **Primary Campaign Source** field: If the lead name can not be found but you know the Campaign Code, it can be populated in “Primary Campaign Source” alone without a lead. SAVE

Connecting your Deal to a Lead or Campaign embeds campaign tracking in the background allowing for ROI reporting

<table>
<thead>
<tr>
<th>Deal ID</th>
<th>13616755</th>
</tr>
</thead>
</table>

**Channel Lead Information**

| Channel Lead | 1test Test1, ABC Company | Primary Campaign Source | Partner-lead Campaign Name |
Review
Lead Management Tool – Review

Review:

1. Login to PartnerDirect, navigate to Lead Management page, “View My Leads” button
2. Select “View All Leads”, GO
3. Work your own event leads as well as any Dell program leads until qualified
4. Look for NEW leads to Accept.
5. Use the Lead buttons to submit New Deal Reg
6. Notate matching leads and deals on your Lead ROI form

That’s it! You’ve now used your Lead Management Tool to view leads and register deals.

For help closing your newly submitted deal contact your Channel Sales team.
Lead Management Tool – more info

- **More information:**
  
  - Your Dell Marketing Manager will be able to answer questions
  
  - Certified Partner Resource desk may be able to help [US_CC_SPD_Support@dell.com](mailto:US_CC_SPD_Support@dell.com) or 877-766-3355